Time Reports in BI

May 2010

Project Timeline

DEC	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG

- Project prep & select agency user group

- Determine top priorities & develop reports

UAT-1   UAT-2

-Production loading

-Train pilot users

Pilot Go-Live May 10

- Conduct pilot & assess
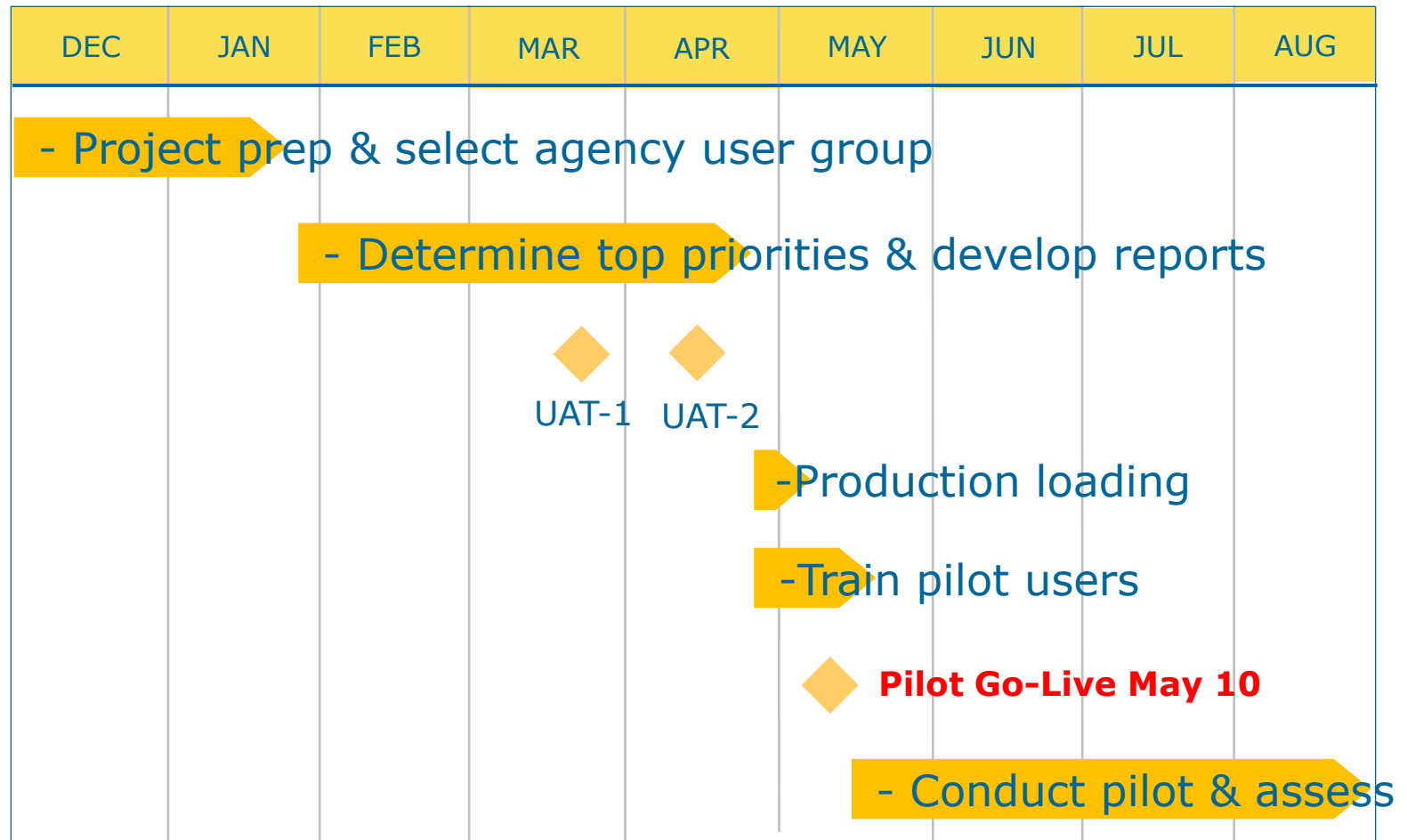
Agency User Group – SME's

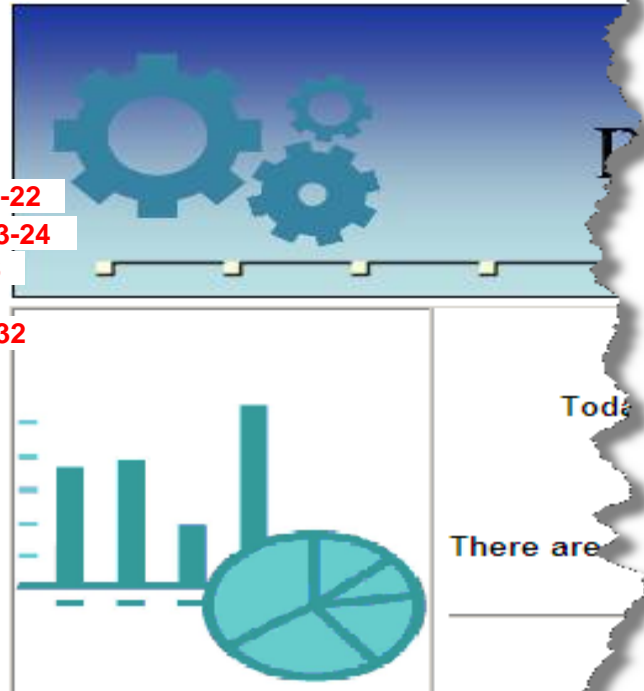| Name	Agency
Marshall Barnes	NC Legislature Fiscal Research
Andrea Cannon-Mang	Dept of Justice
Phyllis Creech	Dept of Agriculture and Consumer Services
Matt Daughtrey	Dept of Transportation
Dan Domico	Crime Control and Public Safety
Sherry Forbes	Information Technology Services
Kim Greene	Crime Control and Public Safety
Patty Norris	Dept of Environment and Natural Resources
Bill Stockard	Office of State Budget and Management
Brenda Warburton	Office of State Personnel
Debbie Watkins	Administrative Office of the Courts
Vicky Williford	Dept of Correction
Mike Zeinstra	Dept of Health and Human Services

New Reports Tab and Menu

Security and Access

- Security is based on having a specific ERP role and having access to the Time tab

- In BI reports, a user has access to the top org unit in the associated ERP role and to all other org units that flow down from that point

	BI Report Group/Name		ERP Security Role
VSL		B0211 VSL Eligibility	New VSL Display role under development
		B0212 VSL Donations By Receiver	
		B0214 VSL Donations by Donor	
CATS		B0208 Late Approvals	Display Time
		B0209 Late Timesheets	
Aging		B0202 Comp Time Aging	Display Time
Quota		B0201 Quota Balances with Estimated Costs	Display Payroll
Quota		B0203 Time Overview by Employee	Display Time
		B0204 Total Time Exceptions (CATS vs. 2001/2002)	
		B0205 Time Leveling Exceptions	
		B0206 Holiday Activity	
		B0207 Time Entry Other Than 9300 on Specified Holiday	

Understanding the Data

- Time records are entered into the system by an employee through ESS, a time administrator, or an external interface. All methods create Cross Application Timesheet (CATS) time entries

- Only approved CATS time entries are available for processing during the daily time evaluation cycle

  - Approval may occur through MSS. Entries made by a time administrator or from an external interface are automatically approved

- Evaluated CATS records create absence records (2001) or attendance records (2002)

  - A Leave Administrator may directly enter 2001/2002 records as in the case of an employee on leave of absence

- Quota balances are updated by the 2001/2002 records

  - A Leave Administrator may manually adjust a quota balance through a 2013 infotype

Understanding the Data, cont.

- No cost or funding data elements are available on these reports because time records do not contain funding information
  - This means fund, funding source, cost center, account, internal order number, and budget code <u>can not</u> be added to the reports
- Charge objects/cost centers are not passed during time evaluation from CATS to 2001/2002 records and are <u>not</u> available on these reports
- When the report data source includes the 2001/2002 records, only the current month and three previous months' data is available as input
  - For example, if today is June 15, the report can be run for any date(s) between March 1 and June 14

Using Report Condition Statements

- Several reports apply condition statements to filter key figures
- A condition statement can be toggled on/off within the report by the user
- Turning on/off a condition
    1. Open the Settings section and select the Conditions tab
    2. Select the condition statement so that it is highlighted
        - Notice the current status of the condition
    3. Select the Toggle State button
        - The condition status changes to either Active or Inactive
        - Selecting the button again, toggles the status back to its previous value
- A user can also add his/her own condition statements by selecting the Add button and following the prompts
    - Condition statements are for key figures only
    - Apply filters to free characteristics

Using Report Condition Statements

B0204: Total Timesheet Exceptions (CATS vs. 2001/2002)

| History Back Forward

⚠ There is a condit. on Organizational Unit, results row suppress. active on Employee's Name[0EMPLOYEE__0EE_SNAME] (conditional

⚠ There is a condit. on Employee's Name, results row suppress. active on Employee[0EMPLOYEE] (conditional

B0204: ...esheet Exceptions (CATS vs. 2001/2002)

Last Data Update: 03/19/2010 14:30:58
Last Refreshed 03/21/2010 12:00:25

...able | Information | Print Version | Export to Excel

Filter Settings

Messages indicate a condition is being applied

Click to open

Settings Before

| Table | Graphic | Exceptions | Conditions | Data Provider |

Condition ⇕	Status ⇕	Definition ⇕
Diff between 2001/2002 and CATS	Active	

Add | Details | Toggle State | Delete

Click to highlight

Click button to change

Settings After

| Table | Graphic | Exceptions | Conditions | Data Provider |

Condition ⇕	Status ⇕	Definition ⇕
Diff between 2001/2002 and CATS	Inactive	

Add | Details | Toggle State | Delete

Variable Entry Screen Date Selection

- Many of the reports include a mandatory date selection field on the variable entry screen

- Opening the date selection drop down allows the user to point to a calendar to select the date or date range

- For faster data entry, dates can be entered directly on the variable entry screen in various formats:
    - Single Day such as "05/01/2010"
    - From/to range such as "04/03/2010 – 04/16/2010" (with spaces)
    - Greater than or equal to such as " >=05/01/2010"
    - Less than or equal to such as "<=01/01/2010"

- BI adds slashes to 8 digit values in a date field
    - For example, "04032010" is read as "04/03/2010"

Variable Entry Screen Date Selection

General Variables

	Variable ⇕	Current Selection	Description
*	Organizational Unit		
*	Employee PersNo. (Single Value, Mandatory)		
*	Calendar Day(s) (Mandatory)		

OK Check

Show tool: Single values ▼ Show view: All ▼

All

| | April | ▼ | 2010 | ► | ►► |

	April 2010							May 2010						
	Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa
14	28	29	30	31	1	2	3	18	25	26	27	28	29	30	1
15	4	5	6	7	8	9	10	19	2	3	4	5	6	7	8
16	11	12	13	14	15	16	17	20	9	10	11	12	13	14	15
17	18	19	20	21	22	23	24	21	16	17	18	19	20	21	22
18	25	26	27	28	29	30	1	22	23	24	25	26	27	28	29
19	2	3	4	5	6	7	8	23	30	31	1	2	3	4	5

Show tool: Value ranges ▼ Show view: Value ranges ▼

Value ranges

Sign: Include ▼
Operator: between ▼
From: *
To: *

Enter a range for
Calendar Day:

Selections

Type	De

Add ►

General Variables

	Variable ⇕	Current Selection	D
*	Organizational Unit		
*	Employee PersNo. (Single Value, Mandatory)		
*	Calendar Day(s) (Mandatory)	>=05/01/2010	>

General Variables

	Variable ⇕	Current Selection
*	Organizational Unit	
*	Employee PersNo. (Single Value, Mandatory)	
*	Calendar Day(s) (Mandatory)	04032010 - 04162010

Compensation Aging Reports

- One report comprises the Compensation Aging section
  - B0202 Comp Time Aging
- Primary data source for this report are infotype 9901 records
- This report displays the current Overtime Comp, Holiday Comp, and On-Call Comp quota balances
  - Columns representing each future month display the number of hours set to age out in that month
- A free characteristic allows the user to display hours aging by day

General Variables		
Variable ⇕	Current Selection	Description
* Organizational Unit	+20000049(0ORGUNIT)	20000049 State Controller
Employee(s) PersNo. (Optional)		

B0202 Comp Time Aging

Cal Mth/Yr			Overall Result	APR 2010	MAY 2010	JUN 2010	JUL 2010
Employee Name ⇕	EE Nbr ⇕	Quota Type ⇕	Remaining Hours ⇕	Remaining Hours	Remaining Hours	Remaining Hours	Remainin
		OT Compensatory Time	45.00	0.00	37.00		
		OT Compensatory Time	54.50	4.00	7.00	4.25	
		OT Compensatory Time	9.00	0.00	6.00		
		OT Compensatory Time	21.50				

▼ Free characteristics
- Age-out Date
- EE Hrs Per Wk
- Employee Group
- Employee Subgroup
- Employment Status
- Job
- Liability Flag
- Organizational Unit
- Position
- Processed Date
- Supv Employee
- Work Schedule Rule

Drag on Age-out Date to see the specific aging date

➢Blank cell means no comp time is set to age out for this period
➢0 value means comp time set to expire this period was used

Quota Reports

- Six reports comprise the Quota section
  - B0201 Quota Balances with Estimated Costs
  - B0203 Time Overview by Employee
  - B0204 Total Time Exceptions (CATS vs. 2001/2002)
  - B0205 Time Leveling Exceptions
  - B0206 Holiday Activity
  - B0207 Time Entry Other Than 9300 on Specified Holiday
- Primary data sources for these reports are the quota balances, manual quota adjustment records (2013's), absence records (2001's), and attendance records (2002's)
  - CATS time entry records are used for comparison purposes in some reports

Quota Reports – Rounding Precision

- The SAP BI time extraction program does not include significant precision on fractional time to allow a split-funded employee's time to total to the true time value in all cases

- For example:
  1. An employee's position is split-funded three ways
  2. The employee enters 8.00 hours worked
  3. The data coming through the BI time extractor program includes three values at 2.67 hours each
  4. When the three records are summarized, the total value is 8.01 instead of the true value of 8.00

- Use ERP transactions and not BI reports for critical decisions that require absolute precision
  - Use the BI time reports as a guide to identifying errors and reviewing information

Quota Reports – Performance

- Quota reports access and evaluate a large volume of detailed data for all employees
- To prevent a report from returning a time out error, keep an inverse ratio between number of employees and number of calendar days entered on the Variable Selection screen
  - For example, to run a report for a large number of organizational units/employees, select a small date range such as a week rather than a month
  - When a larger date range is needed, limit the number of organizational units/employees entered
- <u>Note</u>: Should overall BI system performance become a problem, the BI Technical Team will modify the organizational unit selection criteria to allow single, lowest-level units only to keep BI performance optimal for all users

B0201 Quota Balances with Estimated Cost

- This report displays ending quota balances for one or more employees on a specified day within the current month or the three previous months

- It also displays a cost estimate for each quota based on a simply calculated hourly rate
  - For a full-time employee, the hourly rate is the annual base salary divided by 2080

- Default display includes only the following quota types: Vacation Leave, Sick Leave, Overtime Comp, Gap Hours Comp, Holiday Comp, and Bonus Leave
  - Other quota types are available by adjusting the filter

- Default display includes all employment status types -- active, inactive, and withdrawn

B0201 Quota Balances with Estimated Cost

Organizational Unit ⇕		Employee Name ⇕	EE Nbr ⇕	Calendar Day						Overall Result	
				09/25/2009							
				Quota/Att&Abs Type							
				10 : Vacation Leave		15 : Sick Leave		50 : Bonus Leave			
				Ending Balance	Estimated Cost	Ending Balance	Estimated Cost	Ending Balance	Estimated Cost	Ending Balance	Estimated Cost
20000015	OSP Director's Office			154.53	8,942.65	72.00	4,166.64			226.53	13,109.29
				7.83	271.07	8.00	276.96			15.83	548.03
				387.03	8,437.25	1,311.79	28,597.02	200.00	4,360.00	1,898.82	41,394.27
				293.31	16,079.25	1,077.74	59,081.71	100.00	5,482.00	1,471.05	80,642.96
Overall Result				842.70	33,730.22	2,469.53	92,122.33	300.00	9,842.00	3,612.23	135,694.55

Free characteristics

- Age Range
- Cal Mth/Yr
- EE Hrly Rate
- EE Hrs Per Wk
- Employee Group
- Employee Subgroup

- Employment Status
- Job
- Mths of Svc
- Personnel Area
- Personnel Subarea
- Position
- Position County

- Supv Employee
- Supv Position
- Time Mgmt Status
- Time Type Group
- Working Week
- Work Schedule Rule

B0201 Quota Balances with Estimated Cost

- Tips and Tricks
  - Use this report to provide an "order of magnitude" estimate of agency liabilities for vacation, bonus, or comp time payouts
    - The vacation leave quota is not limited to the 240 hours maximum payout allowed
    - A negative quota balance adds a negative cost estimate to the agency total
  - Change the employment status filter to "inactive" to determine if a retro time evaluation process has created a non-zero balance for a former employee
  - Do **not** use this report to determine the final payout for a withdrawing employee
    - The data for the BI report is extracted after the business day is closed and will always be <u>at least a day behind</u>

B0203 Time Overview by Employee

- This report displays time entered during the selection period and how that time was evaluated to update the quota balances for a single employee
  - The liabilities for Adverse Weather Owed, Advanced Sick Leave Owed, and Advanced Vacation Owed are not included in the default display but can be accessed through the filter
- This report allows for a user defined date range within the current month and three prior months
  - Date range can span months to cover an overtime period or work week (e.g. 03/28/2010 – 04/03/2010)
  - Note: An ERP change was put into production on March 1 to capture daily Beginning Quota balances. Dates selected prior to March 1, 2010 display "0" in the Beginning Quota column but the Ending Quota balance is valid

B0203 Time Overview by Employee

- Known Issues:
  - Paid Time Off PTO
    - An error related to quota processing for Paid Time Off PTO (70) was corrected in the ERP for March 1, 2010 data going forward
    - Values in the Quota Deducted column for Paid Time Off PTO (70) are incorrect for dates prior to March 1
  - Quota Adjustments (2013's)
    - Only quota adjustments (2013 records) entered for the following quota types are displayed in the Adjusted Quota column: Vacation (10), OT Comp (20), Gap Hours (21), Holiday Comp (22), On-Call Comp (26), Holiday Leave (40), and Adverse Weather (61).
    - The Ending Quota column for other quota types includes all 2013 adjustments made, even though the Adjusted Quota column displays a zero value
    - A programming correction in the ERP system is pending

B0203 Time Overview by Employee

| Time Type Group ⇕	Quota/Att&Abs Type ⇕	Att/Abs Time Entered	Beginning Quota	Accrued Quota	Deducted Quota	Paid Out Quota	Expired Quota	Offset Quota	Adjusted Quota (2013)	Ending Quota
Att/Abs Types	9000 : Approved Leave	2.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
	9300 : Holiday Leave	8.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
	9500 : Time Worked	30.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
	Result	40.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Time Eval Results	10 : Vacation Leave	0.00	278.86	0.00	2.00	0.00	0.00	0.00	0.00	276.86
	15 : Sick Leave	0.00	1,947.37	0.00	0.00	0.00	0.00	0.00	0.00	1,947.37
	40 : Holiday Leave	0.00	8.00	0.00	8.00	0.00	0.00	0.00	0.00	0.00
	50 : Bonus Leave	0.00	200.00	0.00	0.00	0.00	0.00	0.00	0.00	200.00
	65 : Community Service Leave	0.00	24.00	0.00	0.00	0.00	0.00	0.00	0.00	24.00
	Result	0.00	2,458.23	0.00	10.00	0.00	0.00	0.00	0.00	2,448.23

- Time Entered is based on 2001/2002 records
- Time Eval Results display how 2001/2002 records updated various quota buckets
  - Quota accruals display if posted during the date range selected on the variable entry screen

B0204 Total Timesheet Exceptions

- This report compares the CATS recorded and approved hours to the 2001/2002 records and calculates a difference
  - Allows for a user defined date range within the current or past three months
  - Rows where the difference is 0 are suppressed by a report condition statement
  - The condition statement can be turned off to view all rows
- This report helps a user determine if a timesheet entry did not process successfully through time evaluation or if a manual 2001/2002 record is present
- Manual 2001/2002 records that cover a range of dates are parsed into separate days based on the employee's work schedule
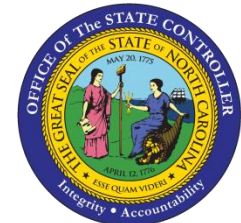
B0204 Total Timesheet Exceptions

Organizational Unit ⬍		Employee Name ⬍	EE Nbr ⬍	Planned Time ⬍	2001/2002 Att/Abs Time Entered ⬍	CATS Approved Time ⬍	Diff Between 2001/2002 & CATS ⬍
20000027	Office of the State Controller			80.00	80.04	80.00	0.04
20010634	OSC Business Services			80.00	80.04	80.00	0.04
20010657	OSC BEACON PROD/TECH Applications			80.00	80.00	40.00	40.00

▼ Free characteristics
- Att/Abs Type
- Calendar Day
- Cal Mth/Yr
- Day of Week
- EE Hrs Per Wk
- EE Time Mngt. Status
- Employee Group
- Employee Subgroup
- Employment Status
- Job
- Personnel Area
- Personnel Subarea
- Position
- Supv Employee
- Supv Position
- Working Week
- Work Schedule Rule

Rounded result calculating difference that can be ignored

Verify HR direct 2001/2002 entry

General Variables			
	Variable ⬍	Current Selection	Description
*	Organizational Unit	+20000049(0ORGUNIT)	20000049 State Controller
*	Calendar Day(s) (Mandatory)	09/06/2009 - 09/15/2009	09/06/2009 - 09/15/2009
	Employee(s) PersNo. (Optional)		
	Time Mgmt Status(s) (Optional)	1	1 - Positive Time Recording

OK   Check

B0205 Time Leveling Exceptions

- This report compares an employee's planned hours to the 2001/2002 records and calculates a difference
  - Planned hours are based on the employee's work schedule
    - Planned hours on a 24X7 Flex schedule are 24 hours per day or 168 hours per week
  - 2001/2002 records that cover a range of dates are parsed into separate days based on the employee's work schedule
  - The report automatically applies a condition to suppress display of rows where the difference is 0
  - Allows for a user defined date range within the current or previous three months
- This report helps determine if all hours for a positive time employee have been accounted for through timesheet entry or direct HR entry
- The report can also be used to review whether a negative time employee has entered any time exceptions during the selection period

B0205 Time Leveling Exceptions

General Variables

	Variable ⇕	Current Selection	Description
*	Organizational Unit	+20000049(0ORGUNIT)	20000049 State Controller
*	Calendar Day(s) (Mandatory)	08/02/2009 - 08/15/2009	08/02/2009 - 08/15/2009
	Employee(s) PersNo. (Optional)		
	Time Mgmt Status(s) (Optional)	1	1 - Positive Time Recording

OK   Check

Organizational Unit ⇕		Employee Name ⇕	EE Nbr ⇕	Planned Time	2001/2002 Att/Abs Time Entered	Diff Between 2001/2002 & Planned Time
20010640	OSC FIN SYSTEMS Tech Applications			80.00	83.50	3.50
				80.00	80.75	0.75
				80.00	88.50	8.50
				80.00	81.00	1.00
				80.00	42.00	-38.00
				80.00	81.00	1.00

Tip: Pick dates that cover an entire overtime period or workweek(s)

B0206 Holiday Activity

- This report lists the amount of holiday time accrued, used, and moved to holiday comp during the selected date range
  - Allows for a user defined date range within the current or previous three months
- The primary data source for this report are the 2001/2002 records for the 9300 absence type
- The report includes two condition statements that are set to inactive by default
- The employee's specific holiday schedule is not automatically taken into account. The user must be aware of what holidays are applicable for the employees and time period selected for the report
  - Holiday accruals occur 30 days prior to the actual holiday, and holiday time can be used from the time of accrual to 30 days after the actual holiday

B0206 Holiday Activity

General Variables	
Variable ⇕	Current Selection
* Organizational Unit	20000088
* Calendar Day(s) (Mandatory)	08/01/2009 - 10/15/2009
Holiday Calendar(s) (Optional)	
Employee(s) PersNo. (Optional)	

OK   Check

Note unexpected values

Organizational Unit ⇕		Employee Name ⇕	EE Nbr ⇕	Accrued Quota	Deducted Quota
20000088	OSC BEACON Integration & Deployment	CANNADY, EDITH		16.00	3.50
		GEORGE, JOSEPHINE		8.00	8.00
		LAGANA, KATHY		16.00	9.00
		SINGLETON, TERESA		16.00	8.00
		STANLEY, STELLA		16.00	8.00

In this example, 16 hours of accruals for Labor Day and Veteran's Day are expected. For deductions, 8 hours for Labor Day is expected.

B0206 Holiday Activity

- Tips/Tricks
  - Evaluate the accrued hours independently from the deducted hours
  - For additional details on the accrued hours, add Calendar Day characteristic to report and change the status of the condition "Accrued Quota <> 0" to active
  - To review the deducted quota column, change "Accrued Quota <> 0" back to Inactive and change status of "Deducted Quota <> 0" to active

	Table	Graphic	Exceptions	Conditions
	Condition ⇕		Status ⇕	Definition ⇕
	Accrued Quota <> 0		Active	
	Deducted Quota <> 0		Inactive	

Add   Details   Toggle State   Delete

Organizational Unit ⇕		Employee Name ⇕	EE Nbr ⇕	Calendar Day ⇕	Accrued Quota	Deducted Quota
20000088	OSC BEACON Integration & Deployment	CANNADY, EDITH	830895	08/08/2009	8.00	0.00
				10/12/2009	8.00	0.00
		GEORGE, JOSEPHINE	1228087	08/08/2009	8.00	0.00
		LaSAINE, KATHY	526352	08/08/2009	8.00	0.00
				10/12/2009	8.00	0.00
		SINGLETON, TERESA	567352	08/08/2009	8.00	0.00
				10/12/2009	8.00	0.00
		STANLEY, STELLA	833418	08/08/2009	8.00	0.00
				10/12/2009	8.00	0.00

Employee is missing Veteran's Day accrual

B0206 Holiday Activity

- Tips/Tricks
  - Setting both the conditions to "Active" status may exclude all data from the report display
  - An employee who moves between org units may display accruals under one org unit and deductions in another
  - Add the Quota/Att & Abs Type characteristic to the report to view the breakdown between 40:Holiday Leave and 22:Holiday Comp Leave
  - Adding the Calendar Day or Quota/Att&Abs Type characteristics to the row section instead of the column section makes the report easier to manipulate
  - Drag off individual cell values (e.g. an employee's name) to remove just that row from the report once issues with that employee are resolved

- The report lists any time posted with an absence/attendance type other than 9300 on the selected day
  - Allows for a user defined date selection within the current or previous three months
- The primary data source for this report are the 2001/2002 records
- The employee's specific holiday schedule is not automatically taken into account
- The user must enter the observed holiday date to be reviewed in the report
- A variable selection for holiday calendar code is optional

B0207 Time Entry other than 9300 on a Specified Holiday

Work Schedule Rule	Organizational Unit	Employee Name	EE Nbr	Quota/Att&Abs Type	Calendar Day 09/07/2009 Att/Abs Time Entered
MTWF-10,HSaS-0	20011938 Agr PID Plant Protection			9000 : Approved Leave	2.00
MTWHF-4x10,SaS-0	20001427 Agr PID Tech, Scientific & Prog Support			9000 : Approved Leave	8.00
	20013882 Agr Standards Weights & Meas Area 2			9000 : Approved Leave	8.00
S-O	20001414 Agr M & P Field Inspectors Area VII			9500 : Time Worked	1.00
MTWHFSaS-5x8	20001440 Agr RS Piedmont			9500 : Time Worked	8.00

Example1

Example 2

Report sample is for Monday, Sep 7 (Labor Day).

Example 1: WSR indicates employee normally works 10 hours on Mondays. Recording 2 hours of 9000:Approved Leave is an expected / acceptable entry

Example 2: Expected employee would have recorded 8 hours of 9300: Holiday Leave instead of 9500: Time Worked.   Need to verify discrepancy

CATS Reports

- Two reports comprise the CATS section
  - B0208 Late Approvals
  - B0209 Late Timesheets
- Primary data source for these reports are the CATS time entry records
  - Data for B0208 is available from the Beacon go-live date
  - Data for B0209 is available from May 1, 2010 forward
- These reports allow a user to review who has approved or released timesheets after a specified number of days has passed between the work date and release date or between the approval date and release date
  - The user sets the variable for "late" by entering the number of days at which the agency considers the release or approval action to be late. The default is 14 "late" days
  - A condition displays only rows where the calculated difference is greater than or equal to the late days

B0208 Late Approvals

- This report displays time that has been approved more than a specified number of days after the released date
  - This report is of limited use to agencies that interface time into Beacon or use Timekeepers to key employee timesheets because the release and approval dates are always the same
    - Toggle the condition to the Inactive state to display data in these cases

General Variables			
	Variable ⇕	Current Selection	Description
*	Organizational Unit	+20000049(0ORGUNIT)	20000049 State Controller
*	Work Date(s) (Mandatory)	03/01/2010 - 03/06/2010	03/01/2010 - 03/06/2010
	# Days Diff Between Approved Dt and Relea	14	14
	Employee(s) PersNo. (Optional)		

Change to meet agency standards

B0208 Late Approvals

Supv Employee	Organizational Unit	Employee Name	EE Nbr	WorkDate	Released date	Approval date	DaysDiff Between Approved Dt & Released Dt	Hours
░░░░░░░░░░	OSC BEACON PROD/TECH APP BI	░░░░░░░	░░░░░	03/01/2010	03/10/2010	03/31/2010	21	10.00
				03/02/2010	03/10/2010	03/31/2010	21	10.50
				03/03/2010	03/10/2010	03/31/2010	21	10.00
				03/04/2010	03/10/2010	03/31/2010	21	4.50
				03/05/2010	03/10/2010	03/31/2010	21	4.50
	OSC BEACON PROD/TECH APP Data Migration	░░░░░░░	░░░░	03/01/2010	03/09/2010	03/31/2010	22	8.50
				03/02/2010	03/09/2010	03/31/2010	22	8.00
				03/03/2010	03/09/2010	03/31/2010	22	7.50
				03/04/2010	03/09/2010	03/31/2010	22	8.00
				03/05/2010	03/09/2010	03/31/2010	22	8.00

Add Att/Abs type as column to see time entry details

▼ Free characteristics
- Att/Abs Type
- Created By
- Created on
- EE Time Mgmt Status
- Employee Group
- Employee Subgroup
- Employment Status
- Job

- Job Branch
- Job Family
- Personnel Area
- Personnel Subarea
- Position
- Premium Code
- Working Week
- Work Schedule Rule

Displays "Push Codes" if used on timesheets

B0208 Late Approvals

- <u>Note</u>: Released Date values
  - In the ERP system, the released date is overwritten by the approval date and no historical record is maintained
  - In BI, the released date is preserved as data is extracted from the ERP system nightly
    - A batch load failure will prevent BI from capturing the release date on records approved between the failure and the next successful batch load process
    - BI sets the release date equal to the approval date when the true release date is not available historically in the ERP system
  - Historical released dates for approved time have been preserved from May 1, 2010 onward

B0209 Late Timesheets

- This report displays time that has been released but not yet approved
  - Agencies that interface time to Beacon or use Timekeepers to key in time will not have data on this report
- Use this report to monitor employees who key in time through ESS

General Variables			
	Variable ⇕	Current Selection	Description
*	Organizational Unit	+20000048(0ORGUNIT)	20000048 State Budget & Management
*	Work Date(s) (Mandatory)	03/28/2010 - 04/03/2010	03/28/2010 - 04/03/2010
	Employee(s) PersNo. (Optional)		
	# Days Diff Between Release Date and Work	14	14

Change to meet agency standards

B0209 Late Timesheets

Supv Employee	Organizational Unit	Employee Name	EE Nbr	Created on	WorkDate	Released date	DaysDiff Between Release Dt & Work Dt	Hours
	OSBM ADMIN MGMT Tech & Data Svcs			04/19/2010	03/29/2010	04/19/2010	21	8.00
	OSBM ADMIN BUD Infrastructure			04/16/2010	04/01/2010	04/16/2010	15	9.00

Add Att/Abs type to see time entry details

▼ Free characteristics
- Agency Hire Date
- Att/Abs Type
- Created By
- EE Time Mgmt Status
- Employee Group
- Employee Subgroup
- Employment Status

- Job
- Job Branch
- Job Family
- Personnel Area
- Personnel Subarea
- Position
- Working Week
- Work Schedule Rule

VSL Reports

- Three reports comprise the Voluntary Shared Leave (VSL) section
  - B0211 VSL Eligibility
  - B0212 VSL Donations by Receiver
  - B0214 VSL Donations by Donor
- Primary data sources for this report are IT696 Absence Pools and IT613 Absence Donation Administration
- Data for these reports is available back to the Beacon go-live in 2008

B0211 VSL Eligibility

- This report gives a list of employees and their established VSL eligibility period(s) established on IT696.

- In the variable selection screen, the Calendar Day variable is to select the VSL eligibility period "begin" date

  - Example 1: Calendar Day value is 01/01/2009 – 03/01/2009

    - An employee whose VSL eligibility period is 02/28/2009 – 03/28/2009 would be selected for the report

    - An employee whose VSL eligibility period is 12/31/2008 – 01/31/2009 would <u>not</u> be selected for the report

  - Example 2: Calendar Day value is >= 01/01/2009

    - This value selects all employees whose VSL eligibility period begins on January 1, 2009 to the current day

B0211 VSL Eligibility

General Variables

	Variable ⇕	Current Selection	Description
*	Organizational Unit	+20000049(0ORGUNIT)	20000049 State Controller
*	Calendar Day(s) (Mandatory)	>=01/01/2009	>=01/01/2009
	Employee(s) PersNo. (Optional)		
	Personnel Area(s) (Optional)		

Receiver Name ⇕	Receiver ⇕	Organizational Unit ⇕		Elig. Begin Date ⇕	Elig. End Date ⇕
		20010652	OSC BEACON BEST SHARED SVCS Human Res	09/07/2009	10/31/2009
		21001675	OSC BEST SHARED SERVICES PY & T Payroll	07/08/2009	07/31/2009
				02/03/2010	02/15/2010
		20010638	OSC STWD ACCT NCAS Model/Sup Serv	09/01/2009	09/18/2009

▼ Free characteristics

- Absence Pool ID
- Age Range
- Business area
- Changed On
- Comments Exist
- County Code
- EEO Category
- EE Time Mngt. Status

- Employee Group
- Employee Subgroup
- Ethnic Origin
- Gender
- Job
- Job Branch
- Job Family
- Personnel Area

- Position
- Seq Number
- SOC State Cat
- SOC State Subcat
- Supervising Employee
- User Name
- Work Schedule Rule

B0212 VSL Donations by Receiver

- This report displays by recipient the hours donated and from whom during a selected time period
- The donor may be within the recipient's agency or within another Beacon agency
- Additional information available on the donor is limited to org unit, personnel area, and donated quota type
  - For security reasons, the donor information is limited to what is available on infotype 613
- **VSL hours from non-Beacon donors are not included in the report**
  - Donations from non-Beacon donors are not available on IT613

General Variables			
	Variable ⇕	Current Selection	Description
*	Organizational Unit	+20000049(0ORGUNIT)	20000049 State Controller
*	Calendar Day(s) (Mandatory)	>=07/01/2009	>=07/01/2009
	Personnel Area(s) (Optional)		
	Employee(s) PersNo. (Optional)		

B0212 VSL Donations by Receiver

Receiver Name ⇕	Receiver ⇕	Organizational Unit ⇕		Donor Name ⇕	Received Hours ⇕
		20010652	OSC BEACON BEST SHARED SVCS Human Res		8.00
					4.00
					16.00
					40.00
		20010638	OSC STWD ACCT NCAS Model/Sup Serv		24.00
					40.00
					32.00
Overall Result					164.00

Additional Donor Data →

Free characteristics
- Age Range
- Business area
- Comments Exist
- Donation Amount related Flag
- Donor Orgunit
- Donor Personnel Area
- Donor Quota Type
- Employee Group
- Employee Subgroup

- Ethnic Origin
- Gender
- Job
- Job Branch
- Job Family
- Personnel Area
- Personnel Subarea
- Position

- Received Date
- Received Month
- Received Quota Type
- Received Year
- Record Changed By
- Record Changed On
- SOC State Cat
- SOC State Subcat
- Supervising Employee

B0214 VSL Donations by Donor

- This report displays by donor the hours donated and to whom during a selected time period

- The recipient may be within the donor's agency, within another Beacon agency, or outside of the Beacon system

- Additional information available on the recipient is limited to org unit, personnel area, and received quota type (not applicable for non-Beacon recipients)

  – For security reasons, the recipient information is limited to what is available on IT613

  – The agency name is "Not Assigned" and the org unit name is "#" for a non-Beacon recipient

B0214 VSL Donations by Donor

Donor Name ⇕	Donor ⇕	Organizational Unit ⇕		Receiver Name ⇕	Donated Hours ⇕
		20005974	HHS SO SOHF		16.00
		20005973	HHS SO SOHF CDC AS Env Svs Laundry	DAUGHTER IN LAW	80.00
		20005974	HHS SO SOHF CDC AS Env Svs Sewing		16.00
		20005973	HHS SO SOHF CDC AS Env Svs Laundry		24.00
		20005973	HHS SO SOHF CDC AS Env Svs Laundry		80.00
		20005973	HHS SO SOHF CDC AS Env Svs Laundry		8.00
	770207	20005973	HHS SO SOHF CDC AS Env Svs Laundry		16.00
		20005973	HHS SO SOHF CDC AS Env Svs Laundry		10.00
Overall Result					250.00

Example of External Recipient text on IT613

Additional Recipient Data

▼ Free characteristics
- Age Range
- Business area
- Comments Exist
- Donated Month
- Donated Quota Type
- Donated Year
- Donation Amount Related Flag
- Donation Date

- Employee Group
- Employee Subgroup
- Ethnic Origin
- Gender
- Job
- Job Branch
- Job Family
- Personnel Area
- Personnel Subarea

- Position
- Received Quota Type
- Receiver Orgunit
- Receiver Personnel Area
- Record Changed By
- Record Changed On
- SOC State Category
- SOC State Subcat
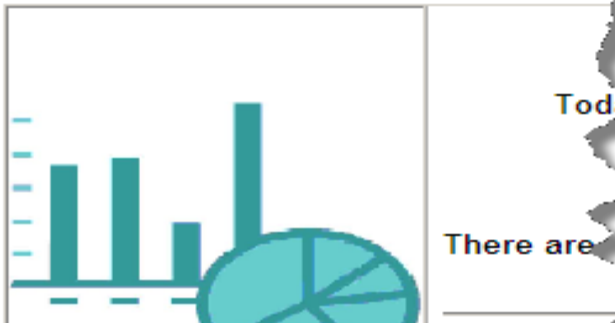- Supervising Employee

New Reports Tab and Menu

Next Steps

- Reports in the Quota, CATS, and Aging folders are available in production on May 10 for pilot users

  – The pilot users are from the agencies represented in the SME list

- Reports in the VSL folder will be made available as soon as security is established based on the new VSL Display role

- The pilot users are to provide feedback to the project team on errors/issues and the usefulness of the reports

- At the end of August, the BI Time Project team will assess whether the new reports are of significant value to deploy to additional users and a deployment timeframe will be created

- Presentation materials, FAQ's and other report documentation are located on the Beacon website

  http://help.mybeacon.nc.gov/beaconhelp/TOC4.html

  Go to the Job Aids folder

How to report issues?

- Each agency represented in the pilot has indicated a preference for the pilot users to provide feedback

Feedback and Issues to	Agency
Marshall Barnes	NC Legislature Fiscal Research
Andrea Cannon-Mang	Dept of Justice
Phyllis Creech, Joy Malok, Erin Allen	Dept of Agriculture and Consumer Services
Matt Daughtrey , Lynette Parrish, Kathi Johnson, Donna Denning,	Dept of Transportation
Sherry Forbes, Linda Levine	Information Technology Services
BEST	Crime Control and Public Safety
Patty Norris, Deborah Blackwell	Dept of Environment and Natural Resources
BEST	Office of State Budget and Management
Brenda Warburton	Office of State Personnel
Debbie Watkins	Administrative Office of the Courts
BEST	Dept of Correction
Mike Zeinstra	Dept of Health and Human Services